

AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions, and listings, of claims in the application:

1-25. (canceled)

26. (previously presented) A computer-implemented method of facilitating access to investment research documents, comprising:

receiving an investment research document from a content publisher;

receiving an indication of a first document tag from the content publisher, wherein the first document tag is associated with first domain having a single-rooted, hierarchical data structure;

automatically determining an associated tag for the document based on a rule associated with the first document tag, wherein the associated tag is associated with a second domain having a single-rooted, hierarchical data structure;

transmitting an indication of the associated tag to the content publisher;

receiving an indication from the content publisher, the indication indicating whether the automatically determined associated tag is appropriate;

assigning a second document tag to the investment research document based on the associated tag and the received indication;

retrieving the investment research document in accordance with the second document tag and at least one of: (i) a reader tag, (ii) a request tag, and (iii) an entitlement tag; and

transmitting the retrieved investment research document to a content reader via a communication network.

27-37. (canceled)

38. (previously presented) The method of claim 26, wherein the received indication is associated with an acceptance by the content publisher of the automatically determined associated tag.

39. (previously presented) The method of claim 26, wherein the second document tag comprises the automatically determined associated tag.

40. (previously presented) The method of claim 26, wherein the investment research document comprises at least one of: (i) text information, (ii) image information, (iii) audio information, and (iv) executable information.

41. (previously presented) The method of claim 26, wherein the communication network comprises at least one of: (i) the Internet, (ii) an intranet, (iii) a public network, (iv) a public switched telephone network, (v) a proprietary network, (v) a wireless network, and (vi) a local area network.

42. (previously presented) The method of claim 26, wherein the investment research comprises at least one of: (i) financial information, (ii) financial news, (iii) information about financial events, (iv) investment information, and (v) market information.

43. (previously presented) The method of claim 26, wherein at least one of the tags is associated with at least one of: (i) an author, (ii) a date, and (iii) an information type.

44. (previously presented) The method of claim 26, wherein at least one of the tags is associated with at least one of: (i) a sector, (ii) an industry, (iii) a research type, (iv) a company, (v) an issuer, (vi) a region, (vii) a country, (viii) an investment product, (ix) a security instrument, (x) a third-party rating, (xi) a research analyst, (xii) a strategist, (xiii) an event type, (xiv) a subject, (xv) an investment style, (xvi) a market cap, (xvii) a document type, (xviii) an information value, and (xix) a currency.

45. (previously presented) The method of claim 26, wherein the first document tag comprises at least one of: (i) a primary tag, and (ii) a secondary tag.

46. (previously presented) The method of claim 26, wherein the rule is associated with at least one of: (i) a start date, (ii) an end date, (iii) antecedent tags, (iv) descendant tags, and (v) sibling tags.

47. (previously presented) The method of claim 26, wherein investment research document are received from a plurality of content publishers.

48. (previously presented) The method of claim 26, wherein said transmitting is performed via at least one of: (i) a content controller, (ii) a content reader, (iii) a personal computer, (iv) a server, (v) a portable computing device, (vi) a telephone, (vii) a Web site, and (viii) an electronic mail message.

49. (previously presented) An apparatus, comprising:
a processor; and
a storage device in communication with said processor and storing instructions adapted to be executed by said processor to:

receive an investment research document from a content publisher;

receive an indication of a first document tag from the content publisher, wherein the first document tag is associated with first domain having a single-rooted, hierarchical data structure;

automatically determine an associated tag for the document based on a rule associated with the first document tag, wherein the associated tag is associated with a second domain having a single-rooted, hierarchical data structure;

transmit an indication of the associated tag to the content publisher;

receive an indication from the content publisher, the indication indicating whether the automatically determined associated tag is appropriate;

assign a second document tag to the investment research document based on the associated tag and the received indication;

retrieve the investment research document in accordance with the second document tag and at least one of: (i) a reader tag, (ii) a request tag, and (iii) an entitlement tag; and

transmit the retrieved investment research document to a content reader via a communication network.

50. (previously presented) The apparatus of claim 49, wherein said storage device further stores at least one of: (i) a tag database, (ii) a document database, and (iii) a tag association database.

51. (previously presented) The apparatus of claim 49, further comprising:
a communication device coupled to said processor and adapted to communicate with at least one of: (i) a content publisher, (ii) a document storage device, (iii) a content controller, (iv) a content reader, and (v) a payment service.

52. (previously presented) A medium storing instructions adapted to be executed by a processor to perform a method of facilitating access to documents, said method comprising:

receiving an investment research document from a content publisher;

receiving an indication of a first document tag from the content publisher, wherein the first document tag is associated with first domain having a single-rooted, hierarchical data structure;

automatically determining an associated tag for the document based on a rule associated with the first document tag, wherein the associated tag is associated with a second domain having a single-rooted, hierarchical data structure;

transmitting an indication of the associated tag to the content publisher;

receiving an indication from the content publisher, the indication indicating whether the automatically determined associated tag is appropriate;

assigning a second document tag to the investment research document based on the associated tag and the received indication;

retrieving the investment research document in accordance with the second document tag and at least one of: (i) a reader tag, (ii) a request tag, and (iii) an entitlement tag; and

transmitting the retrieved investment research document to a content reader via a communication network.

53. (canceled)